Official Guide for Building Energy Benchmarking in Montgomery County

A step-by-step guidance document for complying with the County's Benchmarking Law

January 2023

DEPARTMENT OF
ENVIRONMENTAL
PROTECTION
MONTGOMERY COUNTY • MARYLAND

This guide provides background information and step-by-step instructions to help Montgomery County building owners comply with the Building Energy Benchmarking Law.

If you need additional assistance, please contact Montgomery County's Department of Environmental Protection at energy@montgomerycountymd.gov.

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Quick Resources

Sign up for the monthly Commercial Energy News e-newsletter: bit.ly/MoCoBBNews

Use ENERGY STAR's Benchmarking Starter Kit: bit.ly/EPAstart

For questions about complying with the County's Benchmarking Law, contact DEP at energy@montgomerycountymd.gov.

For questions about using Portfolio Manager, contact EPA directly at buildings@energystar.gov.

Additional resources and forms are available at the County's Benchmarking website: bit.ly/bbmontco

Benchmarking and Reporting Checklist

- ☐ **1** Identify a point person responsible for compliance
- ☐ **2** Collect annual energy use data for your building
- ☐ **3** Create a user account in EPA's Portfolio Manager
- ☐ **4** Add your Covered building(s) to your account
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- ☐ **9** Enter Recognized Data Verifier credentials
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- ☐ **11** Retain the auto-generated confirmation email

See the full checklist online.

About the Benchmarking Process and Benchmarking Law Requirements

What is Energy Benchmarking? Energy Benchmarking means tracking a building's energy use and using standard metrics to compare the building's performance against past performance and to its peers nationwide.

What are the Benefits? Benchmarking improves our understanding of energy consumption patterns; quantifies energy performance to compare against past performance and other similar buildings; helps identify energy saving opportunities within a portfolio of buildings; and manages business bottom line through consistent data collection and tracking. Read more about the Benefits of Benchmarking.

History of the Benchmarking Law
In May 2014, Montgomery County adopted Bill 2-14, Environmental Sustainability – Buildings – Benchmarking and amended the original legislation by Bill 35-15 Environmental Sustainability – Benchmarking – Amendments in November 2015 and by Bill 16-21 Environmental Sustainability - Building Energy Use Benchmarking and Performance Standards – Amendments in April 2022.

The law requires the County and commercial building owners to:

- Track the energy use of buildings 25,000 gross square feet and greater in the county in ENERGY STAR Portfolio Manager,
- Have data verified by a Recognized Data Verifier the first year and every three years thereafter, and
- Report data to the County by June 1st annually for public disclosure.
- Meet long-term site energy use intensity performance standards.

Public and private commercial buildings must continue to benchmark and report data by June 1st each year. The Department of Environmental Protection (DEP) is responsible for the implementation of this Law.

Covered Buildings and Deadlines

What is a Covered Building?
A building covered under the Benchmarking Law is a commercial or residential building 25,000 gross square feet or larger. For compliance purposes, buildings are grouped by size and type into County, Group 1, Group 2 Group 3, Group 4, and Group 5 covered buildings.

For benchmarking purposes, a "building" is any single structure utilized or intended for supporting or sheltering any occupancy, except if a single structure contains two or more individually metered units operating independently that have stand-alone heating, cooling, hot water, and other mechanical systems, and no shared interior common areas. Your building may be exempt if it contains individually owned or leased spaces where:

- each space is less than 25,000 gross square feet, and
- each space does not share and is not connected by any interior space (even hallways), and
- each space has its own energy systems (like HVAC and hot water heating) and there are no shared energy systems between spaces, and
- each space has separate utility meters for all utilities.

Covered Building Groups and Deadlines

There are 5 groups of Covered buildings required to benchmark annually under the Benchmarking Law in Montgomery County:

Covered Building Group	Building Size (Total Gross Square Footage of Building)	First Calendar Year of Data Reported to DEP	First Reporting Deadline
County	County-owned commercial buildings 50,000 GSF and greater	2014	June 1, 2015
Group 1	Commercial buildings 250,000 GSF and greater	2015	June 1, 2016
Group 2	Commercial buildings 50,000 to 250,000 GSF	2016	June 1, 2017
Group 3	Commercial buildings 25,000 to 50,000 GSF; County buildings 25,000 to 50,000 GSF; Previously exempted buildings of all sizes	2022	June 1, 2023
Group 4	Multifamily residential buildings 250,000 GSF and greater	2022	June 1, 2023
Group 5	Multifamily residential buildings 25,000 to 250,000 GSF	2023	June 1, 2024

Benchmarking Task to Complete	Deadline Each Year
Request any data needed to benchmark your building from your tenants	March 31
Collect data responses from tenants	April 30
Submit waiver application forms to DEP, if applicable	May 1
Request requests to your utility company for aggregated data	May 1
Submit benchmarking data to the County by using the reporting link on DEP's website	June 1

Covered Building Inventory

DEP developed a Covered Buildings Inventory to raise awareness about the Benchmarking Law. This list of buildings covered under the Law was created with current Maryland tax assessment records and the CoStar commercial building database.

Building owners can find [the most current version of the Covered Buildings Inventory on DEP's Benchmarking Website](#).

Note: This inventory is an approximation, meant to raise awareness about the Law and help identify the buildings covered by the Law. Each building owner needs to confirm their own building square footage to determine coverage under the Law.

Compliance is dependent upon the building owner's record of their building square footage, regardless of the information on the Covered Building Inventory. This inventory will be used only as a tool by DEP and should be considered the same by building owners and other stakeholders.

DEP can correct errors in the Covered Buildings Inventory. Issues with the Tax Assessment data should be brought to the attention of the [Maryland Tax Assessor](#).

Montgomery County Building ID (MBID)

What's an MBID Number?

Your building's Montgomery County Building ID is your building's unique benchmarking ID. The ID is based on the Parcel Identification Number/Tax ID. It is critical that you enter your Montgomery County Building ID (MBID) in using the exact format as it appears in [DEP's covered buildings list](#), including any zeroes at the beginning of the ID or any underscores and letters at the end.

If your building spans several tax parcels, you have multiple buildings to report on one tax parcel, or you cannot find your building on the Covered Buildings Inventory, contact DEP at energy@montgomerycountymd.gov.

Special cases:

- If you have a building spanning multiple tax parcels, [contact DEP](#) for guidance on which MBID to use in your submission.
- If you are separately reporting multiple buildings on one parcel, please refer to the Covered Buildings Inventory for each building's ID or [contact DEP](#) for guidance on which MBID to use in your submission

Entering MBID Numbers in Portfolio Manager

To be sure your building is counted as compliant by DEP, you will need to enter your MBID in Portfolio Manager, exactly as it appears in the Covered Buildings Inventory.

Without entering the MBID in Portfolio Manager exactly as it appears, your property may be deemed non-compliant.

To enter your MBID number:
- Under the Details tab, you will find a Unique Identifiers box on the left side of the page.
- Under the "Standard IDs" section, you'll select "Montgomery County, MD Building ID (MBID)" from the drop-down menu.
- Enter your building's MBID in this field.

Resources:

- DEP's [Private Covered Buildings Inventory.](#)
- [Online GIS map](#) created from current Maryland tax assessment records to locate the parcel that your building sits on, and see what other buildings share your parcel.

Exemptions apply to:

1. A building that can document that it is a single building less than 25,000 gross square feet. For benchmarking purposes, a "building" is any single structure utilized or intended for supporting or sheltering any occupancy, except if a single structure contains two or more individually metered units operating independently that have stand-alone heating, cooling, hot water, and other mechanical systems, and no shared interior common areas. Your building may be exempt if it contains individually owned or leased spaces where:
    - each space is less than 25,000 gross square feet, and
    - each space does not share and is not connected by any interior space (even hallways), and
    - each space has its own energy systems (like HVAC and hot water heating) and there are no shared energy systems between spaces, and
    - each space has separate utility meters for all utilities.

2. A building for which more than 50% of the total gross floor area is used for:
    - public assembly in a building without walls,
    - industrial uses where the majority of energy is consumed for manufacturing, the generation of electric power or district thermal energy to be consumed offsite, or for other process loads*; or
    - transportation, communications, or utility infrastructure.

Buildings with at least 10% warehousing, self-storage, and manufacturing/industrial uses were previously exempted.

Buildings with approved exemptions will no longer be considered a covered building and will be exempt from future reporting requirements.

Waivers

Building owners can request waivers in the cases where the Covered building:

- Experiences financial distress, defined as the building is subject of a tax lien sale or public auction due to property tax arrearages; is controlled by a court-appointed receiver; or was recently acquired by a deed in lieu of foreclosure;
- On average, less than one full-time-equivalent employee occupied the building during the calendar year being reported*;

- The covered building is newly constructed and has received its certificate of use and occupancy during the calendar year for which benchmarking is required; or
- The covered building was demolished or received its demolition permit during the calendar year for which benchmarking is required.

* Buildings with average physical occupancy of less than 50% throughout the calendar year were previously waived

Waivers are valid for one year. Building owners must submit a Building Exemption/Waiver Application to DEP no later than May 1 of each deadline year.

Special cases:

- Submit one form per property. Enter the Montgomery County Building ID exactly as it appears in the covered buildings list (with any leading zeros or underscore with capital letters). Submit any relevant supporting documentation along with the application to justify the exemption/waiver. Exemptions and waivers must be reviewed and approved by DEP.
- Contact us if you have a special case to discuss.

Applying for an Exemption or Waiver
Building owners must submit a Building Exemption/Waiver Application to DEP no later than May 1 of each deadline year. Waivers are valid for one year. Buildings with approved exemptions will no longer be considered a covered building and will be exempt from future reporting requirements.

Use the Exemption and Waiver Form to submit your request. If you need to report an exemption or waiver for calendar year 2021 or earlier, please contact DEP for instructions.

Collecting Building Characteristics and Energy Data

Building Characteristics Information to Collect
Building owners will need certain building characteristics data to create a property record in Portfolio Manager. The information required varies by building type. You can view a list of required inputs by property type before you get started.

You can either follow the prompts built into Portfolio Manager or you may use the Montgomery County version of the Portfolio Manager Data Collection Worksheet to pre-assemble your information. Montgomery County Data Collection Template (MS Word, 96 KB).

You may need to contact your building tenants to obtain complete information about your building characteristics before entering data into Portfolio Manager. Building owners must request any space data needed in writing to the tenant no later than **March 31** of each compliance year. Tenants must respond within 30 days of a request, per the Benchmarking Law. Using this template is not required and is meant only as a guide. Tenant Information Request Letter Template (MS Word, 99 KB).

Gather Covered Building Energy Data
You will need whole-building energy data for all utilities to benchmark properly in Portfolio Manager. Energy data include electricity, natural gas, steam, chilled water, fuel oil, solar, and any

other fuel sources used at the property. Reported data must include any common area meters <u>and</u> tenant meters.

Reminder: you are **not** required to benchmark or disclose water or waste/materials data or utility costs under the County's Benchmarking Law.

There are two ways to gather your energy data needed for benchmarking:

1. <u>Collect your utility bills/invoices</u>:

   - If you are the account holder of all your meters and all your energy data are available to you, you may manually input your utility bills. (Portfolio Manager provides a [bulk-upload option](#) to easily upload multiple meters at the same time using an Excel spreadsheet template.)

   - If you have tenants, you can request that they share/send their energy data to you for the purposes of benchmarking. Or, read below for information on requesting data from your utility/utilities directly.

2. <u>Request energy data electronically from your utility company:</u> If you have multiple meters in your building, it is possible to request whole-building/aggregate data from your utility for benchmarking purposes. This service is most beneficial to building owners with several buildings and 5 or more meters in each building, particularly where tenants pay the utility bills.

   - If you have **5 or more meters**, you can usually request whole-building/aggregated data without tenant authorization.

   - If you have **4 or fewer meters**, you can request data from your utility but must obtain authorization from tenants to obtain their energy data. Building owners will need to receive written authorization from each tenant.

When to Request Utility Data
Utilities may take up to 30 business days to provide your energy data but typically process requests within 10 business days; the wait can be longer as we approach compliance deadlines. DEP encourages building owners to request their data no later than **May 1** of each compliance year.

Utility-Specific Information
Utilities serving Montgomery County have systems in place to assist building owners with complying with the Benchmarking Law:

- **BG&E** (electricity) offers information on getting electronic, aggregated data at [Automated Benchmarking](#).

- **Pepco** (electricity) customers can find information on getting their electronic, aggregated data at [Pepco Energy Benchmarking](#).
  - To request data, [email](#)the [Electricity Use Data Request Form](#). The form must contain complete information identifying each electric meter (Meter Number) servicing the building. A Meter Number for each electric service point is acceptable if individual

customer account numbers are not available. You may request up to 24 months of history.

- o Once set up, you will receive log in information to Pepco's [Resource Advisor] platform, which allows you to access whole-building historic, monthly consumption data by month and year, for the meters and/or account numbers submitted.
- o You are then able to sync Resource Advisor to Portfolio Manager so that data is automatically sent to Portfolio Manager. This syncing process will transfer the data historically and as new bills become available. Follow the instructions in the [Portfolio Manager Process] guide to connect Resource Advisor to Portfolio Manager.

- **Potomac Edison** (electricity) – A account holders can log-in to their account on the [First Energy website] to retrieve their data electronically or send an [email] for commercial aggregated usage data requests. The basic steps are outlined here:
  - o Send an [email] with a list of meter numbers servicing your property and the time period for which you are requesting data. You must send an [email] to request updated data each year.
  - o Potomac Edison will email you back a spreadsheet containing aggregated, monthly electricity usage which you can then enter or upload into Portfolio Manager.

- **Washington Gas** (natural gas) customers can find information on getting aggregated gas bill data at Washington Gas Energy Benchmarking. The basic steps are outlined here:
  - o Set up your account at the [Washington Gas Benchmarking Portal]
  - o Upload a list of all gas meter numbers servicing the building. The street address of the building is not acceptable.
  - o You are then able to sync your Washington Gas data to Portfolio Manager so that data is automatically sent to Portfolio Manager. This syncing process will transfer the data historically and as new bills become available. Reference the [Washington Gas user-guide] (p. 9 to 19) for detailed step-by-step instructions.

Benchmarking in Portfolio Manager

To streamline the process of benchmarking, the Benchmarking Law requires use of U.S. EPA's free, industry-standard ENERGY STAR Portfolio Manager Tool as the recognized software for benchmarking and reporting. Read about it at [www.energystar.gov/benchmark]. Building owners <u>must</u> use Portfolio Manager for benchmarking and reporting; other benchmarking tools cannot be used to comply with the Benchmarking Law.

There are two methods for getting your building benchmarked:

Method 1: Do-It-Yourself Benchmarking
Portfolio Manager is built to be user-friendly and accessible for in-house staff to benchmark their buildings. In many cases, accounting, operations, and building management staff are entering data into Portfolio Manager. If you choose to Do-It-Yourself, below are some helpful tools to guide you:

- [DEP's How-To Guide] provides step-by-step directions and screenshots to guide you through the benchmarking process from creating a new property through to submitting to DEP.

- [Portfolio Manager Quick Start Guide] ([PDF], 508 KB) offers the basics to setting up your Portfolio Manager account, including adding your property, entering your energy data, and seeing your results.

- [Details on Entering Your Utility Bill Data](#) ([PDF](#), 567 KB) walks you through the steps to set up a meter and correctly enter data, add data to an existing meter, complete spreadsheet uploads, and information on Web Services (automated benchmarking).

- [Portfolio Manager Trainings](#) offers both live and recorded webinars, written and video tutorials, and how-to guides for specific functions of the software.

- [Portfolio Manager Technical Support](#) offers advice and guidance on how to benchmark your building(s) in Portfolio Manager. Here, you can search existing FAQs or ask a question.

Method 2: Hire an Energy Service Company to Benchmark

Benchmarking is a common and regular practice for any energy efficiency or conservation project. In Montgomery County and around the region, there are many energy service companies that offer an array of services to help you manage your energy use. Many of these same companies are experienced in benchmarking and can help you benchmark your building.

How to Find an Energy Service Company

DEP does not endorse a particular company or business, but we can direct you to existing lists of energy service companies that do similar work:

- Montgomery County [Benchmarking Ambassadors](#) have received training on the County's benchmarking requirements on how to properly benchmark in Portfolio Manager to comply with the Benchmarking Law.

- Trade Ally Programs offer a list of companies that assist utilities with energy efficiency improvements, many of which also offer benchmarking services:
  - [Pepco Trade Ally Program](#)
  - [BGE Service Providers](#)
  - [Potomac Edison Trade Ally Program](#)

- [ENERGY STAR Licensed Professional Finder](#) can help you find local Licensed Professionals that have verified properties near you for ENERGY STAR certification. This directory is updated quarterly.

- [ENERGY STAR Service & Product Providers (SPPs)](#) have demonstrated their expertise and achievements by meeting strict ENERGY STAR program requirements for benchmarking customer buildings using Portfolio Manager and gaining ENERGY STAR certification for buildings.

- [ENERGY STAR Partners](#) have a made a commitment with ENERGY STAR to support benchmarking and improving building energy performance.

DEP cannot endorse any specific company or business, but we recommend asking a few companies about their experience for benchmarking, ability to help deliver energy savings, and other services they offer. You can ask for quotes from multiple companies, and they may be able to help you benchmark and improve your building's energy performance.

Data Verification

Verification is considered an industry best practice and ensures that building and energy data entered into Portfolio Manager are accurate. The purpose of verification is to enhance the quality of data being reported collectively through the Benchmarking Law. Verification requires a second pair of eyes from someone with knowledge about Portfolio Manager and building energy performance.

The Benchmarking Law requires that building owners complete a verification process the first year of reporting and every 3 years after. Standard verification years are shown in the table below for each benchmarking group. Individual buildings may be on a different schedule depending on when verification last occurred.

Additional information can be found in DEP's How-to Guide for Data Verification (PDF, 160 KB).

Building Group	CY 2020 Data	CY 2021 Data	CY 2022 Data	CY 2023 Data	CY 2024 Data	CY 2025 Data
County Buildings (50k SF+)	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report
Group 1 (250k SF+)	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report
Group 2 (50k SF - 250k SF)	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report
Group 3 (Commercial buildings 25k – 50k SF; County buildings 25k – 50k SF; Previously exempted buildings of all sizes)			Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report
Group 4 (Multifamily 250k+ SF)			Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report
Group 5 (Multifamily 25k - 250k SF)				Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report

Who can Complete Verification?

To comply with the law, building owners must demonstrate that reported benchmarking data is verified by a **Recognized Data Verifier**. A Recognized Data Verifier is a professional with a current verification credential that is recognized and approved by the DEP Director. This person can be in-house staff or from a third-party firm.

The following is a list of credentials that DEP has identified as acceptable to be a Recognized Data Verifier:

Verification Credential	Institution / Association
Professional Engineer (PE)	National Society of Professional Engineers
Licensed Architect	National Council of Architectural Registration Board
Registered Architect (RA)	American Institute of Architects (AIA)
Certified Commissioning Authority (CxA)	AABC Commissioning Group (ACG)
Certified Energy Manager (CEM)	Association of Energy Engineers (AEE)
Certified Energy Auditor (CEA)	AEE
Certified Building Commissioning Professional (CBCP)	AEE
Certified Measurement and Verification Professional (CMVP)	AEE
Energy Management Professional (EMP)	Energy Management Association
Existing Building Commissioning Professional (EBCP)	AEE
LEED – Professional with specialty in Building Operations + Maintenance (LEED-AP O+M)	US Green Building Council (USGBC)
LEED-Fellow – For outstanding APs	USGBC
Building Energy Assessment Professional (BEAP)	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
Building Energy Modeling Professional (BEMP)	ASHRAE
Building Commissioning Professional Certification (BXCP)	ASHRAE
Operations & Performance Management Professional (OPMP)	ASHRAE
Certified Commissioning Professional (CCP)	Building Commissioning Association (BCA)
Associate Commissioning Professional (ACP)	BCA
Sustainability Facility Professional (SFP)	International Facilities Management Association (IFMA)
Certified Facility Manager (CFM)	IFMA
RPA/FMA High Performance Designation (RPA/FMA-HP)	Building Owners and Managers Institute (BOMI) International
Systems Maintenance Technician (SMT)	BOMI International
Systems Maintenance Administrator (SMA)	BOMI International

Verification Credential	Institution / Association
Real Property Administrator (RPA) with caveat requirements[1]	BOMI International
Certified Property Manager (CPM) with caveat requirements[2]	Institute of Real Estate Management (IREM)

How to Complete Verification

The Recognized Data Verifier should review the Data Verification Checklist generated in Portfolio Manager *(available under the Reports Tab, in the top right box)* and confirm the building profile information and energy meter data. The required verification does not include a review of water metrics, waste data, or indoor air quality—nor does it require a site visit.

The Recognized Data Verifier must complete and sign Data Verification Checklist and give it to the building owner. This signed Verification Checklist does not need to be submitted to DEP unless it is requested (as authorized by the legislation). Therefore, building owners must retain the most recent signed Data Verification Checklist for at least three years.

How to Report Verification to DEP

Once verification is completed, the building owner must enter the following details about the Recognized Data Verifier in the **Verification fields on the Details** tab for each Covered building in Portfolio Manager (see example below):

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[1] RPA must have been achieved with the elective course, Asset Management OR achieved with completion of at least 3 of the 5 Sustainability/High Performance Experience Criteria. Submit documentation to energy@montgomerycountymd.gov.

[2] CPM must have been achieved with the following three functions selected and illustrated in the Experience Form: #3, #30, and #33. Submit documentation to energy@montgomerycountymd.gov.

Alternative Verification Path

Alternatively, buildings can meet the verification requirement if the owner can demonstrate that the building has been awarded the ENERGY STAR building certification from EPA for at least 6 months of the year being benchmarked.

For example, if a Group 2 building receives the ENERGY STAR certification in September 2020, the previous 12 months of energy data were used to earn the certification (October 2019 – September 2020). The ENERGY STAR can be used to satisfy the 2020 verification requirement since the energy data used to earn the ENERGY STAR certification covers more than 6 months of 2020 (January – September 2020 data).

If a building owner is using this verification path for a Covered building, please indicate this in the Property Notes field by stating "ENERGY STAR Certification used for verification" and the month and year certification was achieved.

Reporting Data to the County

When to Report

All buildings in Montgomery County covered under the Benchmarking Law must report benchmarking data to DEP on or before June 1st annually. A new reporting link is made available on DEP's Benchmarking website each year.

Before Reporting

Prior reporting benchmarking data to DEP, be sure you have fulfilled the following requirements:

- Enter all energy and space use information in Portfolio Manager. Enter all data from January 1 – December 31 for the calendar year being reported for each Covered building.
- Run Portfolio Manager's tool to check for possible data errors prior to submitting data to DEP to ensure that you have no fatal energy errors in your data submission. The Data Quality Checker timeframe should align with December 31st of the calendar year being reported. Alerts related to water or waste/material meters can be ignored.
- The Data Quality Checker is located on the "Summary" tab. Click "Check for Possible Errors."

> Run the Data Quality Checker for the calendar year being reported.

- Identify your properties with your Montgomery County Building ID (MBID). Under the "Standard ID" section, you'll select "Montgomery County (MD) Building ID" and enter your building's MBID, then click Save.

> Enter your MBID number in the Standard ID fields under the Details tab.

- **Please note**: If you are a third-party energy services company, you <u>must</u> receive approval prior to submitting benchmarking data on behalf of a Covered building owner and indicate your client's information in the "About Your Response" section of the data request.

How to Report

Reporting to the County is easy once you've completed your benchmarking in Portfolio Manager. DEP provides a new reporting link on the benchmarking website each year that will facilitate electronic reporting to the County through Portfolio Manager.

There will be a new reporting link for each compliance year. Building owners must use the DEP-provided reporting link to comply with the Law. DEP will not accept data submitted outside of this data request link.

Check the [DEP Benchmarking website](#) or read the [Commercial Energy News](#) emails in the months preceding the June 1st deadline for the reporting link for the current reporting year. Follow the steps below to submit your data to the County:

Step 1: Click the Reporting Link

The reporting link will take you to the ENERGY STAR Portfolio Manager account log-in screen—after logging in, you'll see step-by-step instructions on the Data Request page (see sample screenshot on the next page). DEP recommends taking a screenshot or printing the instructions so you can refer to them later.

Please note: a new reporting link is made available on the DEP Benchmarking website for each reporting year. The link you used to report previous calendar years' data will not be the same as the link you'll use to report future calendar years' data.

Step 2: Generate the Response Preview

Select the Covered buildings you would like to report to the County and generate the response preview. The timeframe is pre-set for each compliance year and cannot be changed—this allows the County to collect the same date range for all Covered buildings.

If you are an energy service company submitting benchmarking data on behalf of a Montgomery-County-based client, you **must** report that you are submitting data on behalf of someone else. The contact from the drop-down must reflect the building owner information. This also notifies your client that you are submitting data on their behalf to comply with the Law.

Energy service companies submitting data **MUST** indicate the building owner contact info here.

This timeframe will be locked for the compliance year of data requested by DEP.

Select the Covered Buildings to be reported to DEP here.

Step 3: Send the Response to DEP

Once you click "Generate Response Preview," you'll be directed back to the Reporting tab in Portfolio Manager with an alert message that looks like this:

## **This green box does not mean you are done with reporting!**

While the response preview has been generated, you still need to submit the data to DEP. Yes, the green box here can be deceiving!

Scroll down to the Templates & Reports section to send DEP your data by selecting "Send Response" next to the Data Request template name for that calendar year (see sample screenshot on the next page).


Once the response preview is generated, select the "Send Response" action from the drop-down menu.

If your response preview looks like the sample below, **STOP!** Select the "Read More" hyperlink and resolve all energy-related errors before sending any data to DEP.

If your response preview has warning signs, **STOP!**

Resolve all errors before submitting data to DEP.

Step 4: Confirm Submission of the Response to DEP's Data Request and Send Data

If there are no errors, proceed with sending your data to DEP. Once you select the "Send Response" action, you'll arrive on the confirmation page (Confirm Response to DEP's Data Request, see sample screenshot on the next page).

Select any other contacts who should receive a confirmation email, choose what format you'd like to receive for a copy of the submitted data *(DEP recommends selecting Excel)*, and e-sign your response with your username and password before pressing "Send Data."

Confirm Response to Data Request from Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection)

By clicking Send Data, you will release data to Montgomery County Department of Environmental Protection (Montgomery County Department of Environmental Protection). You will receive a confirmation email with a receipt and a copy of the data attached.

1 Who (besides you) should we send a confirmation email to?

Select contacts from your contacts book:

Bill D. Ing (bill@abc.123)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

Separate multiple emails by a comma or semicolon.

Add other contacts if you'd like them to receive a copy of the confirmation email (i.e., building owner, green team leader, supervisor).

2 What format would you like your data in for the email attachment?
- Excel
- XML

You'll receive an attachment of the data you submit to DEP. Indicate which format you'd like to receive the data in.

3 E-Sign your Data Response

I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Montgomery County Department of Environmental Protection with Montgomery County Department of Environmental Protection.

Your username: *
Your password: *   E-Sign Response

E-sign your response here (Portfolio Manager username and password).

Send Data

Remember to Send the Data to DEP!

Step 5: Save the Confirmation Email (and Data Verification Checklist)

After you click "Send Data," retain the auto-generated confirmation email you'll receive from Portfolio Manager, as well as the signed Data Verification Checklist from your recognized data verifier and other records related to the energy reporting process.

DEP will review the data you reported and follow-up with an email confirming your compliance for that calendar year or noting any errors you must resolve to comply.

Requesting an Extension

If you would like to request an extension for benchmarking and reporting to the County's Benchmarking Law, please submit the Benchmarking Extension Application. Extensions are available for periods of 14 days or 30 days.

After Reporting

If you need to make a change after you reported data, make your change and re-report your data to DEP. If it's the same building record in Portfolio Manager, the updated information will automatically replace what is reported to us.

Please note: if you make changes in your Portfolio Manager account, DEP does not automatically receive those updates; you must go through the process of sending the data using the Data Request reporting link again (see Steps 1-4 with screenshots in the previous section).

Enforcement

The Benchmarking Law is enforceable under Method 2 regulations (including fines for noncompliance), and any violation of the Law is a Class A violation. DEP will send out a Notice of Violation to any building owner of a Covered building who does not comply with the Law in advance of issuing a citation.

Note that DEP is available to provide technical assistance and resources to any building owner to help them comply with the Law.

Disclosure

The Benchmarking Law requires the County to make reported benchmarking information readily available to the public. DEP publishes benchmarking data on or before October 1st, following the June 1st benchmarking deadline. The first year's data of each reporting group will not be disclosed. Disclosure will begin the second year of each building group's reporting. For example: Disclosure will begin with calendar year 2016 data reported in 2017, the second year of reporting for Group 1. Data will eventually be available in the CountyStat system.

Disclosed data and annual benchmarking reports are available on DEP's Benchmarking website.

Resources and Documents

All benchmarking resources and documents can be found on DEP's Benchmarking website under the Resources tab. Descriptions and direct links to the resources are available below:

Newsletter Updates

Building owners should sign up for the Commercial Energy News email newsletter to stay up to date on compliance deadlines and other important Benchmarking Law information.

Benchmarking How-To Guide

DEP's How-To Guide provides step-by-step directions and screenshots to guide you through the benchmarking process from creating a new property through to submitting to DEP.

How-to Guide for Data Verification

This guide will help building owners and Recognized Data Verifiers complete verification required under the Benchmarking Law. Answers to general questions, separate step-by-step sections for both building owners and Recognized Data Verifiers, and additional resources to make verification a smooth and easy process. How-to Guide for Data Verification (PDF, 160KB).

ENERGY STAR Portfolio Manager Assistance

EPA offers a variety of resources to help users navigate the ENERGY STAR Portfolio Manager tool. The ENERGY STAR Help Desk offers an extensive list of searchable FAQs as well as different

avenues to contact EPA staff with questions. EPA also offers [Portfolio Manager Trainings](#) that include full-length or short training videos, either in pre-recorded or live viewing formats.

Benchmarking Ambassadors

The County's Benchmarking Ambassadors attended special 3-hour "train-the-trainer" Ambassadors Trainings at Montgomery College, taught by EPA ENERGY STAR Portfolio Manager Staff, got the details about complying with Montgomery County's Law, and information on accessing data from utilities. If you have a question about the Law or how to best proceed with your benchmarking, [these individuals and organizations](#) are a great place to start.

Disclaimer: Inclusion in this list does not confer certification, an official endorsement, or approval from the Montgomery County Government or any of its agencies.

DEP's Building Inventory

Building owners can find [the most current version of the Private Covered Buildings Inventory on DEP's Benchmarking Website](#).

Note: This inventory is an approximation, meant to raise awareness about the Law and help identify the buildings covered by the Law. Each building owner will need to confirm their own building square footage to determine coverage under the Law.

Building Definitions and Scenarios

With the variety of building arrangements and complexes in the County, DEP has put together a document that explores different scenarios building owners may find and whether an exemption may be warranted. [Covered Buidings Guide(](#)[PDF](#), 934 KB).

Tenant Information Request Letter Template

Building owners may need to request operations information from their tenants to have a full and complete Portfolio Manager property entry. Building owners must request any space data needed in writing to the tenant no later than March 31 of each compliance year. Tenants must respond within 30 days of a request, per the Benchmarking Law. Using this template is not required and is only meant as a guide. [Tenant Information Request Letter Template](#) (MS Word, 99 KB).

Building Exemption and Waiver Application

Per the Benchmarking Law, commercial buildings may request an exemption for certain use types or a waiver if the building meets certain requirements. Covered buildings seeking an exemption/waiver must submit [this form](#) to DEP no later than May 1 of the compliance year.

Requesting an Extension to the Benchmarking Deadline

If you would like to request an extension for benchmarking and reporting to the County's Benchmarking Law, please submit the [Benchmarking Extension Application](#). Extensions are available for periods of 14 days or 30 days.

Benchmarking Case Studies

DEP has put together a collection of case studies and profiles on the building owners in Montgomery County that have benchmarked their buildings. See all the BENCHMARKED profiles on [DEP's My Green Montgomery site](#).

Montgomery County DEP Support

Montgomery County DEP offers support for building owners benchmarking in Portfolio Manager through the following resources:

- Benchmarking Law and Requirements Questions: If you have a question about compliance, details of the Law, or the processes and procedures to comply, email your question to DEP at energy@montgomerycountymd.gov.

- Portfolio Manager Support: In general, DEP uses the same Portfolio Manager resources as the public and can refer you to Portfolio Manager's technical support. DEP may offer to try to help you with any straightforward questions in Portfolio Manager – in these cases, we may ask you to share your property (read-only) with us so we can look at it from our computers to try to solve the problem. You can revoke this sharing at any time. To request/schedule a DEP session, email DEP at energy@montgomerycountymd.gov.